Topic 3 : Project Management

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Tools
& Techniques

Project Charter

Project Charter

PURPOSE

Gives the project manager authority to spend the project budget for the delivery of the project.

WHAT'S IN IT?

- "Why?"
- "Who?"
- "What?"
- "When?"
- "Where?"
- "How?"

A project charter is a formal document that outlines the shared understanding of a project's scope, development, and project objectives, while also defining the roles and responsibilities of each party involved. It's generally a fairly short document.

Project charters give the green light for a project to begin. Similar to the legal definition of the word "charter," a charter in project management authorizes a project to exist and empowers the project manager to execute the work and spend the project budget. If the charter is approved, the project moves into the planning phase.

What Is the Purpose of a Project Charter?

1. You need it to authorize your project. This is the document that sells the project to your stakeholders and defines broadly what their return on investment will be. It's like an elevator pitch, so it has to sell the project.
2. It serves as a primary sales document. When you present this to the stakeholders, they now have a summary to distribute or present when approached about other projects, so they can focus their resources where they're needed.
3. This is a document that stays with you throughout the life cycle of the project. You'll be referring to it throughout, whether at meetings or to assist with scope management. The charter acts as a roadmap without the minutia to distract you from other project materials.

When Should I Create the Project Charter?

The project manager should create the project charter during the project initiation phase. Documenting the purpose of the project, what activities will be part of execution, and who is responsible for performing which activities is critical for aligning key stakeholders before the project kickoff.

Project Charter

Part I: Project Overview

|			
Project Name			
Project Charter Author			
Creation Date		Last Revision Date	
Project Requestor		Project Manager	
Project Charter Status (Pending/Approve/Reject)			
Project Sponsor Signature		Date of Project Approval	
Proposed Project Start & End Date			

Part II: Project Details

Project Description	
Project Purpose	
Project Goals & outcomes	
Project Scope	
Project Deliverables	
Benefits	
Stakeholders	
Constraints / Risks	
Assumptions	
Project Team	
Budget Requirements	

What Is A Work Breakdown Structure (WBS)?

A work breakdown structure (WBS) is a way to visualize an entire project's tasks, phases, and deliverables.

Here's the hard truth: crafting a WBS is one of the hardest project planning tasks, but one of the most important to get right. It will help you identify the activities that are required to complete a project and organize those activities into manageable chunks of work.

"The WBS is a hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables. The WBS…represents the work specified in the current approved project scope statement".
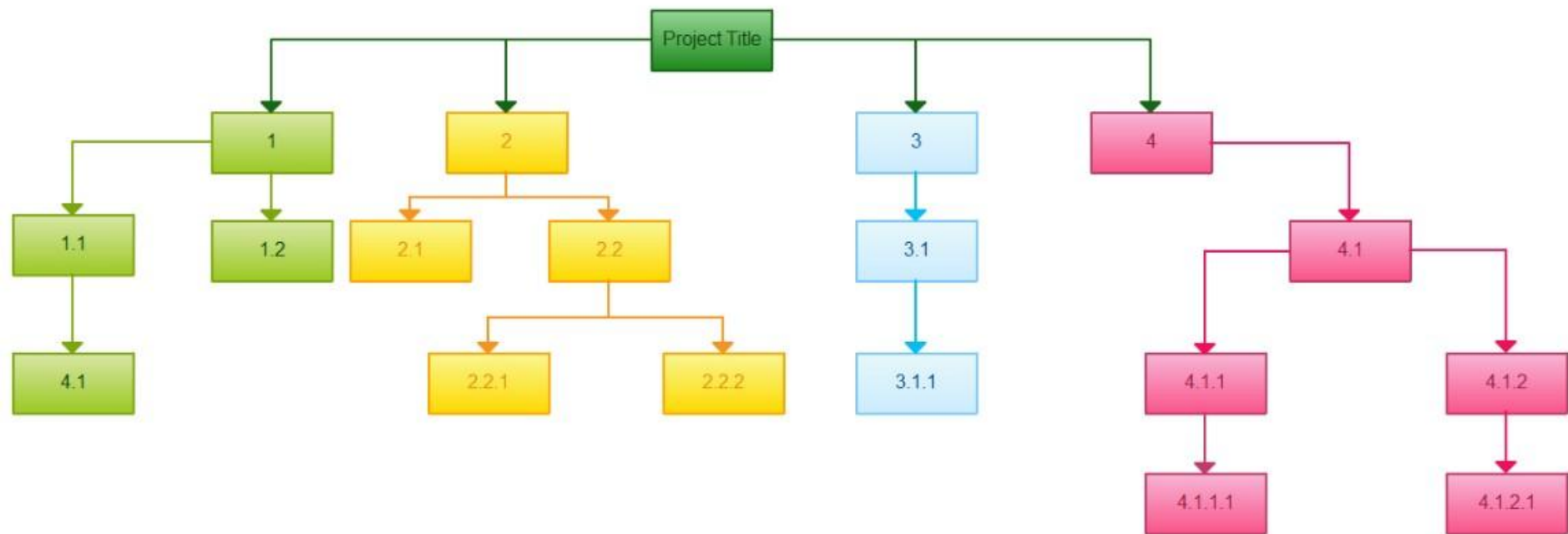
A conceptual illustration of a work breakdown structure.

Components Of A Work Breakdown Structure

Here are some items you'll need to include in your work breakdown structure:

- Deliverable: A tangible or intangible good or service produced as a result of a project that is intended to be delivered to a customer (either internal or external)
- Control Account: The work assigned to one organizational unit within the WBS; used for budgeting and reporting purposes
- Planning Package: An organizing unit that describes a group of related tasks underneath it (the work package)
- Work Package: An organizing unit within a WBS that groups together a set of related activities
- WBS Dictionary: Includes additional details about each element that comprises the WBS

The deliverables (or phases in some cases, as I'll explain in the next section), control accounts, planning packages, and work packages are plotted like the below example.

Gantt Chart/Project Schedule

A Gantt chart is a powerful project management tool that provides a visual timeline of a project's schedule. It is a type of horizontal bar chart where the vertical axis lists project tasks and the horizontal axis represents a timeline.

A good Gantt chart tells a visual story about the relationships between the work to be done plotted over a period of time.

It shows what has to happen in order for something else to start, or what has to finish for something else to finish.

It shows what work will be happening concurrently in a silo and what work will require collaboration.

It articulates phases and gives logic to key dates.

It takes the complexity of the project and distills it into simplicity.

And it shows a viable path to success.

Benefits Of A Gantt Chart

- The Gantt chart is designed to organize essential project tasks and timing data in one place in a visual manner.
- It is beneficial to use a Gantt chart in project management because it allows you to see at a glance how each task relates to the other tasks, what is due when, and how much time is allotted for each task.
- This helps you to stay organized and on track as you work on your project. Additionally, a Gantt chart can help to identify potential risks and problems early on in the project so that they can be addressed before they become too serious.

An example Gantt chart.

A Gantt chart for the construction of a guest house (Source).

Risk Management Plan

A **Risk Management Plan** is a foundational document in project management that outlines the strategy for identifying, analyzing, and responding to potential risks throughout a project's lifecycle. It is a proactive, not reactive, tool that helps project teams and stakeholders prepare for both negative threats and positive opportunities.

The purpose of a risk management plan is to provide a structured, systematic approach to handling uncertainty, ensuring that the project stays on track to meet its objectives, scope, schedule, and budget. It is the "how-to" guide for managing risk on a specific project.

Risk Mitigation Plan

Risk	Trigger/Cause	Owner/Assignee	Response/Risk Mitigation Plan	Contingency Plan
RISKS WITHIN THE PROJECT [Scope, Timeline, Technical & Functional Requirements, Prioritization]				
1.				
2.				
RISKS WITHIN THE PROJECT TEAM				
1.				
2.				
RISKS WITHIN THE CLIENT/USER				
1.				
2.				

Functional Specification document (FSD)/Requirements Document

Functional requirements

This is where we dive into the core of the product. The functional requirements spell out exactly what the product needs to do, feature by feature. It's the heart of the document, giving developers a clear direction on how to bring the product to life. But it's not just a dry list – it's about solving real problems and creating value for users and the business.

TEMPLATES

Choose templates with predefined sections

Just worry about completing the fields with the information collected

When should you create a functional specification?

The right time to create a functional specification is during the early planning stages of a project. Before any code is written or designs are finalized, it's important to have this document in place. It lays the foundation and fits seamlessly into the project's overall lifecycle, acting as a guidepost through design, development, and even testing.

DEVELOP IN THE EARLY STAGES OF THE PROJECT

DESCRIBE WHAT THE SYSTEM SHOULD DO

Functional specifications

THEY ARE A GUIDE TO FOLLOW THROUGHOUT THE PROJECT

KEEP ALL STAKEHOLDERS ON THE SAME PAGE

Project Status Report

A project status report is a document that summarizes a project's progress against its plan within a specific timeframe. It keeps stakeholders informed about the project's status, including progress, potential risks, and budget, and helps ensure the project stays on track.

PROJECT STATUS REPORT

Reporting period:		**Project title:**	
Date of report:		**Project manager:**	
Report author:		**Project Sponsor:**	

EXECUTIVE SUMMARY

Narrative Summary of Status	Schedule:	GREEN	Budget:	YELLOW	Issues:	RED
< Add text>						

PROJECT MILESTONE STATUS REVIEW

Project Plan ID	Project Milestones	Status	Baseline Completion Date	Expected Completion Date	Issues Exist (Yes/No)
<ID>	*[Insert Project Milestone]*				

RACI

RACI Matrix

Example RACI Chart

Project Deliverable (or Activity)	Project Manager	Strategist	Designer	Front End Developer	Back End Developer
Design site map	C	R	A	I	I
Design wireframes	C	A	R	I	I
Create style guide	A	C	R	C	I
Code templates	A	I	C	R	C

Responsible
The team member who does the work to complete the task

Accountable
The person who delegates work and provides final review on a task or deliverable before it's deemed complete

Consulted
People who provide input on a deliverable based on the impact on their work or their domain of expertise

Informed
People who need to be kept in the loop on project progress

What is a RACI chart?

A RACI chart is a simple matrix used to assign roles and responsibilities for each task, milestone, or decision on a project. By clearly mapping out which roles are involved in each project task and at which level, you can eliminate confusion and answer the age-old project question, *Who's doing what?*

What does RACI stand for?

RACI stands for Responsible, Accountable, Consulted, Informed. Each letter in the acronym represents a level of task responsibility.

RACI definitions

- **Responsible**: This team member does the work to complete the task.

- **Accountable**: This person delegates work and is the last one to review the task or deliverable before it's deemed complete.

RACI definitions

- **Consulted**: Consulted parties are typically the people who provide input based on either how it will impact their future project work or their domain of expertise on the deliverable itself.

- **Informed**: These team members simply need to be kept in the loop on project progress, rather than roped into the details of every deliverable.

Benefits of a RACI chart

At its core, a RACI matrix helps you set clear expectations about project roles and responsibilities.

When to use a RACI Matrix ?

Here are a few scenarios when a RACI chart comes in handy:

- *The decision-making or approval process could hold up the project.*

- *There's conflict about task ownership or decision-making.*

- *The project workload feels like it's not distributed evenly.*

- *You experience turnover on a team and need to onboard someone quickly to a new role.*

Example RACI Chart

Project Deliverable (or Activity)	Project Manager	Strategist	Designer	Front End Developer	Back End Developer
Design site map	C	R	A	I	I
Design wireframes	C	A	R	I	I
Create style guide	A	C	R	C	I
Code templates	A	I	C	R	C

Responsible
The team member who does the work to complete the task

Accountable
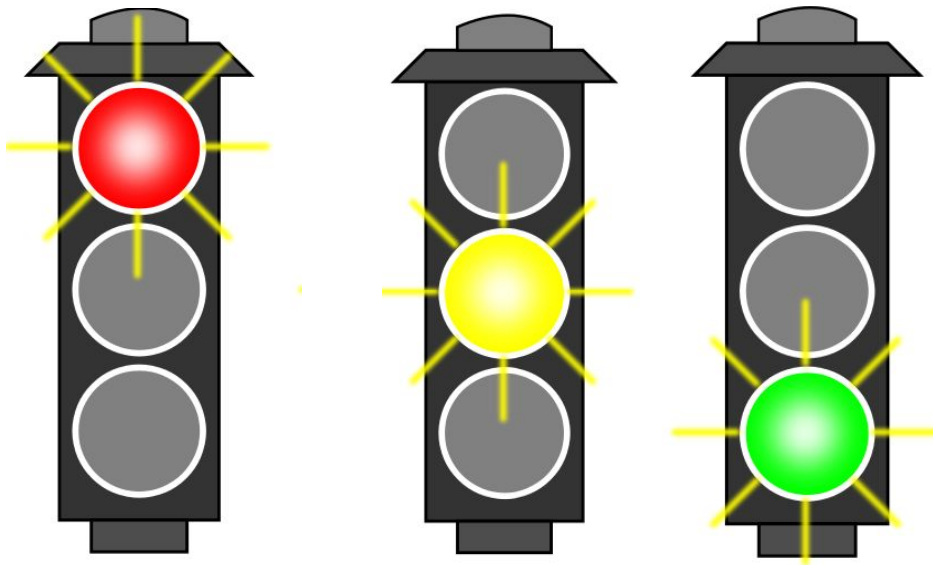The person who delegates work and provides final review on a task or deliverable before it's deemed complete

Consulted
People who provide input on a deliverable based on the impact on their work or their domain of expertise

Informed
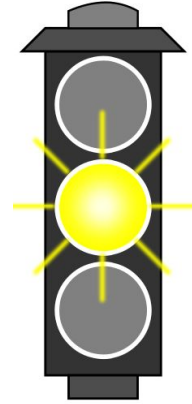People who need to be kept in the loop on project progress

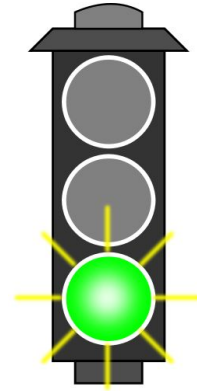# **RAG** Status or traffic light system is often used to determine the following:

○ Project Performance

○ Project Status

○ Indicate how on track or at risk is the project, its deliverables or tasks

○ What action should be done in the Project or the Get well plan

○ And also call the attention of the Stakeholder, Client, Project Manager or Project resource to take or do the necessary action that is needed in the project.
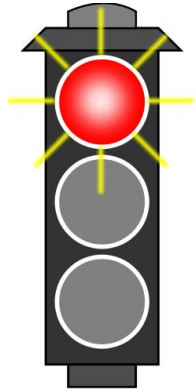
- Red traffic light indicates problems
- Amber the everything is okay
- Green things going well.

RAG

Sample Criteria

RAG	GREEN	AMBER	RED
1. **Cost**	On-budget	At least 5%	At least 10%
2.**Schedule**	On-schedule	At most 10 days delay	At least 11 days delay
3. **Risk**	No-Low Risk	Medium Risk	High Risk
4. **Dispute**	None	With in Project Team	Outside Project Team
5.**Change Request** *(time, quality, cost)*	No Pending	With pending to be approved within Project Team	With pending project to be approved outside Project Team

As with any tool or methodology, you need to do what's right for your project, your team, and you.

Maybe the steps and examples outlined here won't work for you. That's okay!